

The Coaching Agreement Checklist

Ed Schaefer · Version 1.0 · September 2026 · edward-schaefer.com/templates/coaching-agreement-checklist · Free to share

One page for what to settle in writing before session one, and a line to revisit once coaching is underway. Fill in the blanks. "The Decision Before You Hire a Coach" covers whether coaching is the right purchase at all, and the Coach Evaluation Sheet covers choosing among coaches. Both decisions come before this one.

1. Goals, and how progress will be judged

Coaching's own professional standard requires goals to be agreed before or at the first meeting. A vague intention won't hold up months in, when you ask whether it's working.

What I want out of this, in my own words: _____

How will we both know it's working: _____

2. Confidentiality, and its real limits

The ICF (International Coaching Federation, the largest membership body for coaches) holds its own members to a code of ethics. That code requires a coach to "maintain the strictest level of confidentiality with all parties involved, regardless of the role I am fulfilling." That is not the same as absolute confidentiality. The same code allows it to be broken only with a clear prior agreement, and only to cover disclosure required by law or a court order, or a real risk of danger to someone. Past those exceptions, what "strictest" means for your specific engagement is something to negotiate directly.

What counts as confidential here, and what doesn't: _____

3. If your employer is paying

Standard practice is a three-way agreement (also called a tripartite contract) among the coach, the client, and the sponsor — the party paying, when it isn't the client — set up before coaching starts. The ICF's code of ethics requires a coach to raise the conflicts a paying sponsor introduces before they become a problem. Without that conversation, loyalties start to conflict the moment it is unclear what gets reported back to the sponsor.

What will my employer see: a summary of themes, or nothing at all: _____

Who initiated this coaching, and does that change what I say: _____

4. Fees and cadence

Settle the rate and the billing cycle in writing before the first paid session, along with the session length and frequency. Neither the number of sessions nor how long the engagement runs predicts whether coaching works. Commit to what the goal above requires, and no more.

Rate and billing cycle: _____

Session length and frequency: _____

5. How either side ends it

Either party can end the relationship "at any point for any reason during the coaching engagement, subject to the provisions of the agreement." Neither side has to justify leaving. What the agreement should spell out is what "subject to the provisions" means in practice: notice period and refund terms. It should also say what happens to the goal above if the engagement ends before it's answered.

Notice period and refund terms: _____

6. Which roles the coach may occupy

A coach who shifts into mentoring or advising mid-engagement should say so, or ask permission first. The Coach Evaluation Sheet carries the full table of roles (the role a coach occupies moment to moment is called a stance); decide here which you want available, if any.

Roles I want available beyond coaching, if any: _____

How I'll know when a shift happens: _____

7. Revisit this checklist

Revisit this checklist after the first month, and again any time the goal above stops feeling current. The self-check "Is Coaching Working?" walks through what to look for when you do. _____ (your own trigger, if different)